Subject: SPECIALIZED TRAINING

1.0. PURPOSE:

To establish the policy and procedure for requesting funds for specialized training.

2.0. ORGANIZATIONS AFFECTED:

All organizational units of the University, excluding auxiliary organizations.

Important: This procedure, or portions thereof, may be superseded by an agreement between The California State University and an exclusive employee representative.

When referring to this procedure as it relates to actions affecting represented employees, consult the agreement that applies to employees within the represented unit.

3.0. REFERENCES:

3.1. University and Colleges Administrative Manual (UCAM), Sections 5503 and 5522 ff.

3.2. Office of the Chancellor memoranda:

3.2.1. FSA 75-47, Subject: Delegation of Authority and Procedures for the Expenditure of Specialized Training Funds.

3.2.2. FSA 79-54, Subject: Professional Development and Work Week (Applies only to employees who are not in a unit or to those employees in a unit where the Memorandum of Understanding does not supersede this subject).

3.2.3. FSA 73-43/BP73-25, Subject: Funding for Training for Equipment Technicians.

3.3. Cal State L.A. Administrative Procedures, Subjects: Travel Expenses, and Fee Waiver Program.
4.0. **POLICY:**

Trustee policy supports training and development programs for all employees in The California State University. The campus is allocated specialized training funds to supplement resources for training programs. The use of specialized training funds is subject to post audit review and the University is required to provide periodic reports to the Chancellor's Office on the use of the funds. Therefore, all training, career development, and professional development must be fully documented and approved by appropriate individuals on the campus.

The expenditure of training funds must be based on an assessment of needs in areas such as: orientation of new employees; new knowledge and skills training required by changing systems, procedures or technology; correcting job performance deficiencies; organization renewal and communication needs; and supervisory and management development. This assessment will be made within the overall objective and priorities of the campus training program.

After careful needs assessment and identification of the most effective and appropriate resources to meet the training needs of the campus, specialized training funds may be spent for: sending an employee to an out-service training course (including tuition and fees); purchasing materials such as films, cassettes, participants' workbooks, etc., to develop an in-house training course; employing an outside instructor or consultant to offer a course on the campus if no appropriate campus course or instructor can be found; and compensating an employee of The CSU for instructing a training course if the employee has already performed all full-time duties assigned, cannot get released time approved by the appropriate supervisor because of the nature of the employee's duties, and the compensation will not exceed one quarter overtime.

5.0. **DEFINITIONS:**

5.1. **Specialized Training**—Specific training that cannot be provided through on-the-job training or through the fee waiver program. Its purpose is to provide employees with increased skills and knowledge related to job performance and/or career development. It may be either on campus or off campus training.

6.0. **RESPONSIBILITIES:**

6.1. Employees requesting specialized training courses will:

6.1.1. Complete Part I of the Request for Specialized Training form and attach descriptive brochures or pamphlets, etc., which describe the training being requested.
6.1.2. Forward the request to their supervisor for approval.

6.2. Supervisors will complete Section II of the Request for Specialized Training form and forward the form to the department head for approval.

6.3. **Department Heads** will:

6.3.1. Review requests for specialized training and determine the needs of the department and the prospective trainee.

6.3.2. Identify where the requested training comes on the ranked list of priorities of assessed training needs for the department and determine if the training need is immediate, critical, continuing, short-term, or long-range.

6.3.3. Identify any anticipated problems that may result from the need not being met and evaluate whether the proposed training is the best way to meet the need.

6.3.4. Document the information to items 6.3.1.-6.3.3. and forward the Request form to the dean or senior administrator for approval.

6.4. **Deans and Senior Administrators** will:

6.4.1. Identify where the request fits on a ranked list of assessed training needs for the division and determine whether the request represents an isolated instance or a problem common to a group of employees within the division, and determine whether the problem would be better resolved through a group training activity.

6.4.2. Forward the request with supporting documents to the Division of Human Resource Management.

6.5. **The Division of Human Resource Management** will:

6.5.1. Review the information provided in support of the request and allocate funds where appropriate.

6.5.2. Complete the remainder of the Request form.

6.5.3. Prepare periodic reports on the usage of specialized training funds and submit the reports to the senior managers, executive officers, and the Chancellor's Office.

6.6. **The Chief Fiscal Officer** will review and approve/deny all requests for registration fees in excess of fifty dollars.
7.0. PROCEDURES:

7.1. The employee will:

7.1.1. Complete Section I of the Request for Specialized Training form (Appendix 8.1.) and attach a brochure showing the tuition and fees for the course.

7.1.2. Complete a Travel Request form (L110), when appropriate.

7.1.3. Forward the request form(s) to the supervisor for approval.

7.2. The supervisor will complete Section II of the Request form and forward the Request to the department head.

7.3. The department head will attach a memorandum including a recommendation and justification to the request and forward the documents to the dean or senior administrator.

7.4. The dean or senior administrator will attach a memorandum including a recommendation and justification and forward the request to the Division of Human Resource Management.

7.5. The Division of Human Resource Management will review the request, allocate funds consistent with the systemwide and University policies, complete the remainder of the forms, and forward documents including requests for registration fees in excess of fifty dollars to the Chief Fiscal Officer.

7.6. Report Submission--The Division of Human Resource Management will submit a progress report to the Office of Faculty and Staff Relations by January 15 and a final report by July 15 of each fiscal year.

8.0. APPENDICES:

8.1. Request for Specialized Training, HRM-005D.